



Digital Marketing *for* Financial Services

Portfolio of Events 2025-2026

GROW YOUR FINANCIAL SERVICES MARKET SHARE

JOIN FORCES WITH NORTH AMERICA'S FINANCIAL MARKETING EVENT LEADER

UPCOMING EVENTS

1

7th Annual
Digital Marketing *for*
Financial Services
Summit **MIDWEST**

OCTOBER
8-9, 2025
CHICAGO

2

12th Annual
Digital Marketing *for*
Financial Services
Summit **NEW YORK**

NOVEMBER
6-7, 2025
NEW YORK

3

Digital Marketing *for*
Financial Services
Summit **CHARLOTTE**

MAY
7-8, 2026
CHARLOTTE

4

16th Annual
Digital Marketing *for*
Financial Services
Summit **CANADA**

JUNE
10-11, 2026
TORONTO

- The **largest** and **longest-serving portfolio** of digital marketing for financial services events in North America for more than **16 years**
- **4 annual conferences** that solidify our reputation as a leader in the financial marketing space
- **15,000+ decision-makers** in our DMFS community of **senior-level buyers**
- Events attended by **CMOs, VPs** and **Directors** from top financial organizations that are looking to elevate their digital marketing
- Hybrid event platform gives you access to **the biggest names in financial marketing globally**
- **Immersive conference format** showcases your brand in an environment with in-depth engagement



HOW WE DELIVER ATTENDEES

- The premier financial marketing event series with a **strong grasp on the market** and a deep understanding of its needs
- **World-class speakers** and **leading-edge content** attract new buyers to the summit and encourage past delegates to return
- Results-driven delegate sales team **dedicated to securing your top prospects**, target companies and verticals
- **Vetted attendees** to prioritize seniority and relevance while capping sponsors to ensure the event remains unsaturated
- Active in the digital marketing for financial services field **year-round** with our finger on the pulse of **new trends** and the sector's biggest players
- Multichannel **targeted marketing campaign** to our DMFS community, including social media, paid digital, thought leadership content, personalized emails, an event website and brochure

TOP REASONS OUR DELEGATES ATTEND



Source new technology partners



Gain best practices and industry benchmarking



Experience product demos



Engage with peers face to face and virtually



Connect with current solution providers



Test drive new technology



Meet thought leaders and visionaries



Network with industry stakeholders



Stay on top of market trends and innovations

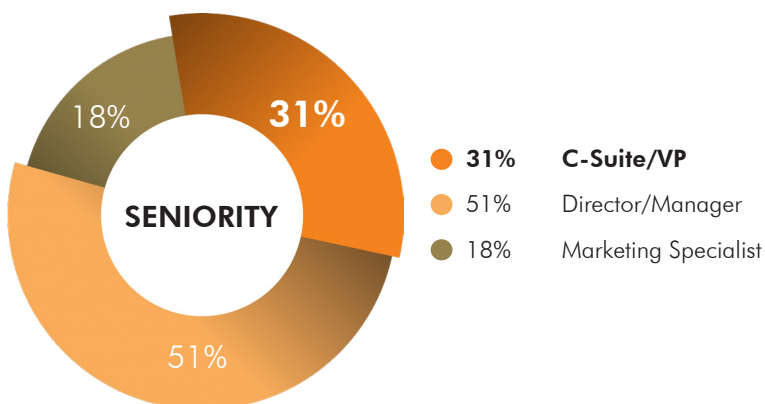
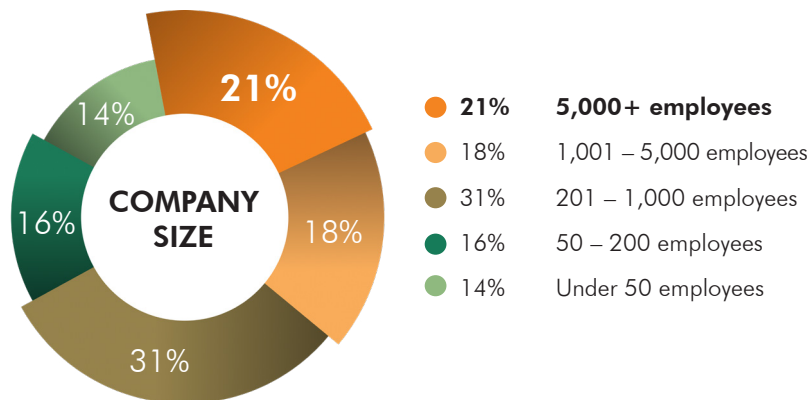
7th Annual

Digital Marketing *for* Financial Services Summit **MIDWEST**

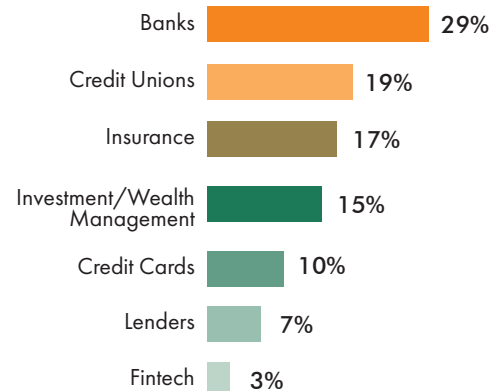
The premier digital marketing event series for financial leaders in the Midwest

This exclusive conference connects top solution providers with **financial marketing innovators** in the Midwest.

OCTOBER
 8–9, 2025
 CHICAGO



MARKET SEGMENTS



KEY METRICS



Director+
 qualified leads



59%
 of attending
 companies generate
 \$100M+ in revenue



PAST SPEAKERS



David Partain
SVP & Global CMO,
FlexShares ETFs
**Northern Trust
Asset Management**



Vijay Konduru
EVP & CMO
Huntington National Bank



Brent F. Korte
SVP & CMO
Ameritas



Judy Edelson
CMO
Apple Bank



Monu Kalsi
VP, Marketing
CNO Financial Group



Alejandra Denda
CMO
The Federal Savings Bank



Sumeet Grover
Chief Digital & Marketing Officer
Alliant Credit Union



Danielle Bateman Gironde
CMO
Midwest BankCentre

PAST ATTENDEES



PAST SPONSORS



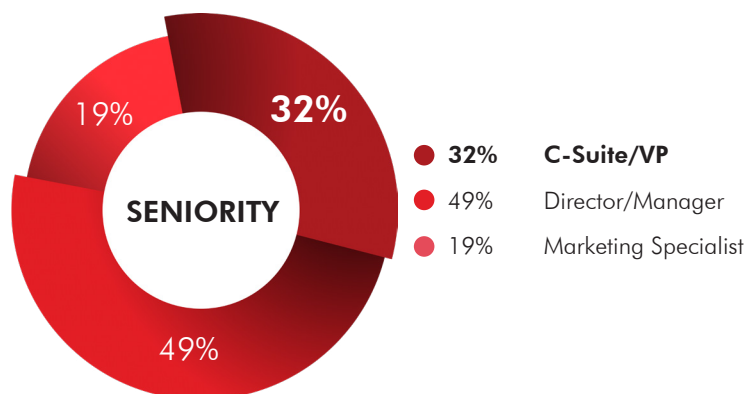
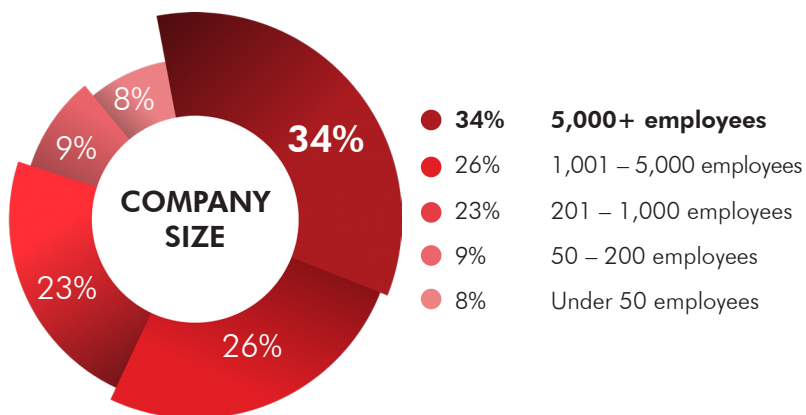
12th Annual

Digital Marketing for Financial Services Summit **NEW YORK**

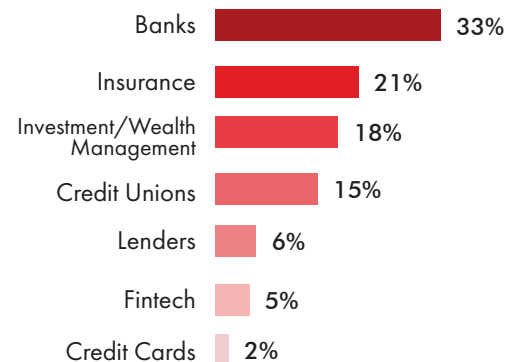
NOVEMBER
6-7, 2025
NEW YORK

The largest and longest-running digital marketing for financial services event series in the United States

This innovative conference attracts **financial services executives** actively looking to invest in solutions to enhance their marketing and branding campaigns.



MARKET SEGMENTS



KEY METRICS


Director+
qualified leads


71%
of attending
companies generate
\$100M+ in revenue


60%
of attending
companies have
1,000+ employees



PAST SPEAKERS



Amy Hu
SVP & CMO
New York Life Insurance Company



Lynn Teo
Chief Marketing Officer
Northwestern Mutual



Jennifer Ball
Chief Marketing Officer
Franklin Templeton



Walter Agumbi
Managing Director, Global Head of
Content & Product Marketing
Goldman Sachs Asset Management



Martiña Gago
SVP, Head of Content Strategy, Personal
Banking & Wealth Management
Citi



Rich Smith
Chief Product & Marketing Officer
PenFed Credit Union



Henry Detering
Chief Marketing Officer
Neuberger Berman



Amresh Mathur
SVP, Head of Digital Acquisition &
Customer Experience
Citizens

PAST ATTENDEES

J.P.Morgan

Goldman Sachs

Morgan Stanley

BlackRock



T.RowePrice



Prudential

BANK OF AMERICA

TIAA

Edward Jones



WOODRUFF SAWYER



Penn Mutual

Blackstone

COLUMBIA
THREADNEEDLE
INVESTMENTS

BNY

MORNINGSTAR



STATE STREET

PAST SPONSORS

Adobe

Seismic

SITECORE

eClerx

Epsilon

moengage

CheQ

DEMANDBASE

SAS

storyful

kaltura

Amplitude

Outlier

maru

GLASSBOX

dynamic yield

Broadridge

Nielsen

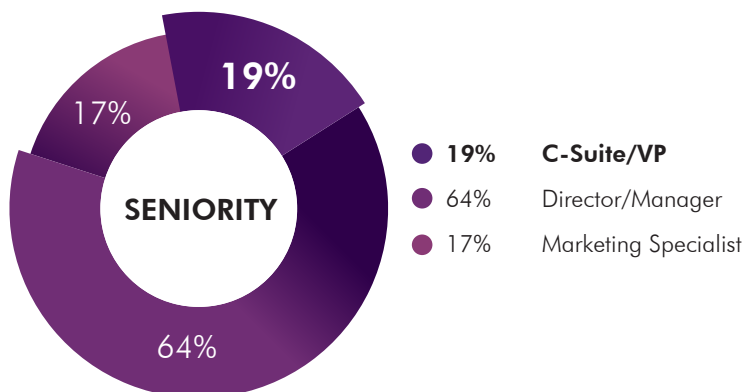
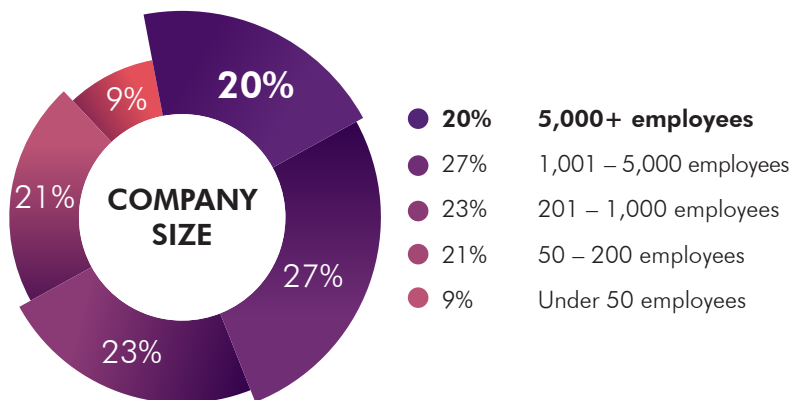
Digital Marketing *for* Financial Services Summit **CHARLOTTE**

MAY
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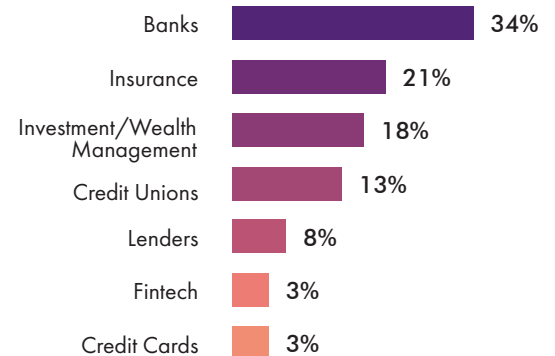
One of the premier digital marketing for financial services event series in the United States

As the newest addition to our DMFS portfolio, this highly anticipated conference targets senior **financial services decision-makers** looking for solutions to advance their digital marketing.

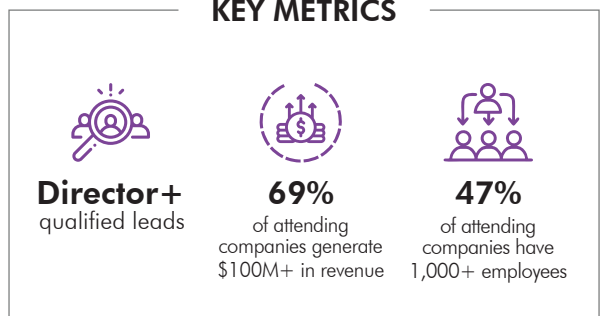
Audience Projection Based off our DMFS Portfolio



MARKET SEGMENTS



KEY METRICS





PAST SPEAKERS FROM OUR DMFS PORTFOLIO



Maha Madain
CMO
Santander Bank



Vanessa Guajardo
CMO & Chief of Staff
US Capital Global



Jeff Wilson
SVP & Head of Marketing - Business,
Corporate & Investment Banking
Citizens Bank



Nidhi Daga
SVP, Growth & Digital Platform
J.P. Morgan Chase



Ben Stuart
CMO & Head of US Marketing
Strategy & Integration
BMO Financial



Ravi Misquitta
SVP, Marketing Strategy &
Technology
Franklin Templeton



Shabina Anwar
VP, Global Loyalty Product
Management
Mastercard



John Renz
VP, Head of Creative,
US Businesses
Prudential Financial

PAST ATTENDEES FROM OUR DMFS PORTFOLIO



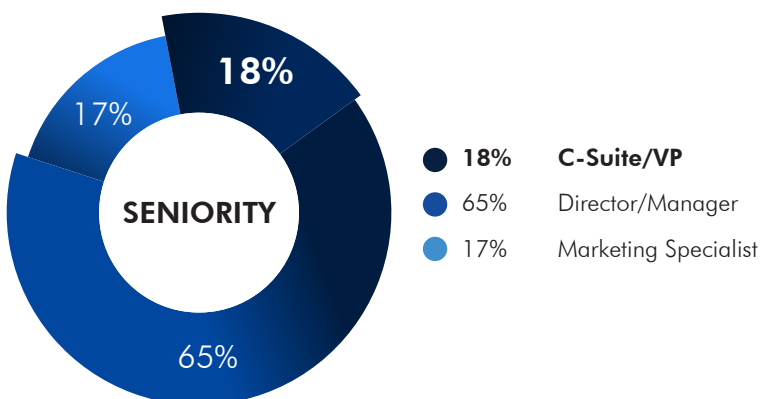
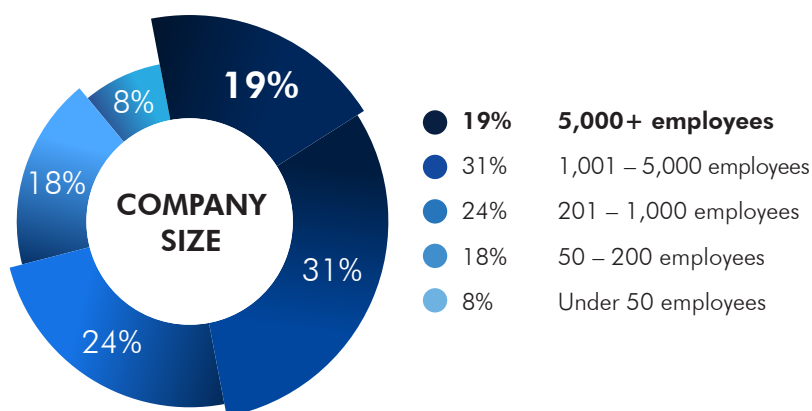
16th Annual

Digital Marketing *for* Financial Services Summit CANADA

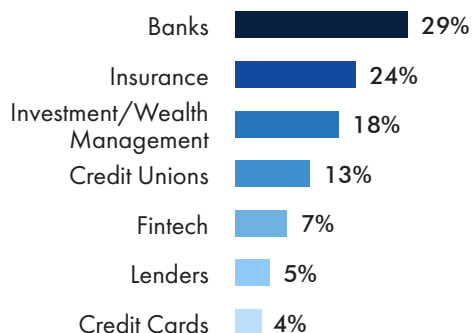
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Canada's largest and longest-running digital marketing for financial services event series

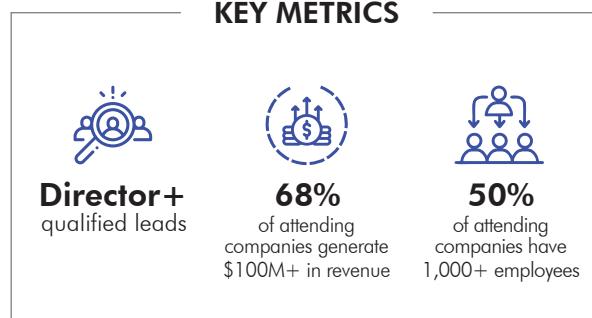
This flagship Canadian conference attracts **financial marketers** actively looking to invest in solutions to transform their digital engagement.



MARKET SEGMENTS



KEY METRICS





PAST SPEAKERS



Betsey Chung
SVP & Global Chief
Marketing Officer
TD Bank



Alan Depencier
CMO, Personal, Commercial
Banking & Insurance
RBC



Chris Hewitt
Global Head of Brand, Digital
Marketing & Marketing Technology
Sun Life Financial



Renu Sihra Sehmi
Head of Enterprise Digital
Marketing Operations
Scotiabank



Katy Dugal Simpson
CMO – The Callaway Black Group
Northwestern Mutual



Margaret Adaniel
VP, Digital, Marketing & Communications
CIBC



Siddharth Vishwanathan
Head of Digital Acquisition
BMO Financial Group



Leanne Nullmeyer
AVP, Marketing & Brand Experience
IG Wealth Management

PAST ATTENDEES



PAST SPONSORS



SPONSOR TESTIMONIALS

“

There is no other event that brings industry leaders in the same room with high intent. DMFS has done a great job of getting highly relevant companies and their highly engaged decision-makers through the door ... This is our third DMFS and has probably been our best to date. Every event seems to get better than the one that proceeds it. Certainly feels like feedback is being heard and acted upon! The attendance and engagement was high, and delegates were interested in learning more about us ... In-person networking was great, everyone was approachable and able to have deeper conversations. Great event for branding and meeting the right people ... Communication leading up to the event was also great. I had all the information I needed and ready to go coming to the start of the conference.

iQUANTI

“

We've participated both in Canada and the U.S. and will continue to do so ... Everyone here is someone who is very highly engaged in marketing, very highly engaged in digital, and they're all interested in getting to that next stage.

Hootsuite

“

Great event for any organization looking to raise their profile and reach a target audience in the financial service sector! Well organized conference. Good networking opportunities. Clear communication and organization. Interesting content ... It was amazing working with the entire DMFS event staff.

PHASE 5

“

DMFS is the place to be for all professionals working in, near, or far from the industry of financial services. Our experience was full of insightful conversations, good meetings and very high-quality leads.

TRSB
Translating Challenges Into Solutions

“

Great event. High-quality attendees and conversations with the right personas. Pleased with the engagement and we plan to come again.

MARIGOLD

“

First time we attended. Very refreshing. Great experience. Lots of new connections ... Very good sessions. We learnt so much! ... The communication leading up to the event was spot on.

SITEPLUG

“

I think the quality of people is fantastic. I had a lot of great conversations and a lot of great leads for us to be calling on.

Broadridge

“

Amazing and fun event to attend! Lots of great thought leaders from the industry to share and gather insights. There was also a lot of support from the Strategy Institute team.

**Dialog
Insight**

YOUR SPONSORSHIP PACKAGES



GOLD

- One of our most prestigious sponsorship opportunities with a **premium slot on the agenda** and **maximum exposure**.
- It features a **30-minute speaking session** as well as a fully branded exhibit booth.
- The package also includes:
 - ▶ A comprehensive brand awareness and co-marketing campaign to 15,000+ financial marketing buyers
 - ▶ Your brand's logo on all event signage and collateral, including the event brochure, website, event app and marketing materials
 - ▶ Access to the complete delegate and speaker list
 - ▶ 3 all-access VIP passes for your team
 - ▶ 10 additional complimentary passes to invite your clients and prospects



SILVER

- The silver package provides the perfect opportunity to **demonstrate your brand's expertise on key themes important to the community**.
- It includes a speaking or moderating spot on a **30-minute panel** as well as a fully branded exhibit booth.
- The package also includes:
 - ▶ A comprehensive brand awareness and co-marketing campaign to 15,000+ financial marketing buyers
 - ▶ Your brand's logo on all event signage and collateral, including the event brochure, website, event app and marketing materials
 - ▶ Access to the complete delegate and speaker list
 - ▶ 3 all-access VIP passes for your team
 - ▶ 10 additional complimentary passes to invite your clients and prospects



YOUR SPONSORSHIP PACKAGES



BRONZE

- Are your main sponsorship goals brand awareness and networking? The bronze package allows you to **display your products onsite and network with prospects face to face.**
- You are provided with a **prime booth location** to demo your products and access to all networking sessions onsite.
- The package also includes:
 - ▶ A fully customizable exhibit booth
 - ▶ A comprehensive brand awareness and co-marketing campaign to 15,000+ financial marketing buyers
 - ▶ Your brand's logo on all event signage and collateral, including the event brochure, website, event app and marketing materials
 - ▶ Access to the complete delegate and speaker list
 - ▶ 2 all-access VIP passes for your team
 - ▶ 10 additional complimentary passes to invite your clients and prospects



NETWORKING

- As an entry-level sponsorship opportunity, **get a feel for the seniority and relevance of our DMFS audience** with the chance to attend the event and leverage onsite branding.
- The package also includes:
 - ▶ 2 all-access VIP passes for your team
 - ▶ Your brand's logo on all event signage and collateral, including the event brochure, website, event app and marketing materials as well as promotion through a co-marketing campaign

ADDITIONAL OPPORTUNITIES

TAILORED TO YOUR BUSINESS NEEDS

What better way to connect with potential prospects than through a host of engaging onsite activities or premier branding opportunities.



Roundtables



Exclusive Evening Reception



Conference Host



Breakfast Briefing



VIP Hosted Dinner



Exclusive Lanyards



Lunch & Learn



Wifi



SECURE YOUR SPOT NOW

**Book a call to learn
how this opportunity
can help you generate
new leads and increase
your pipeline!**



Darren Haughian

Sponsorship Director

Call: 1-866-298-9343 x 276

darren@strategyinstitute.com



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